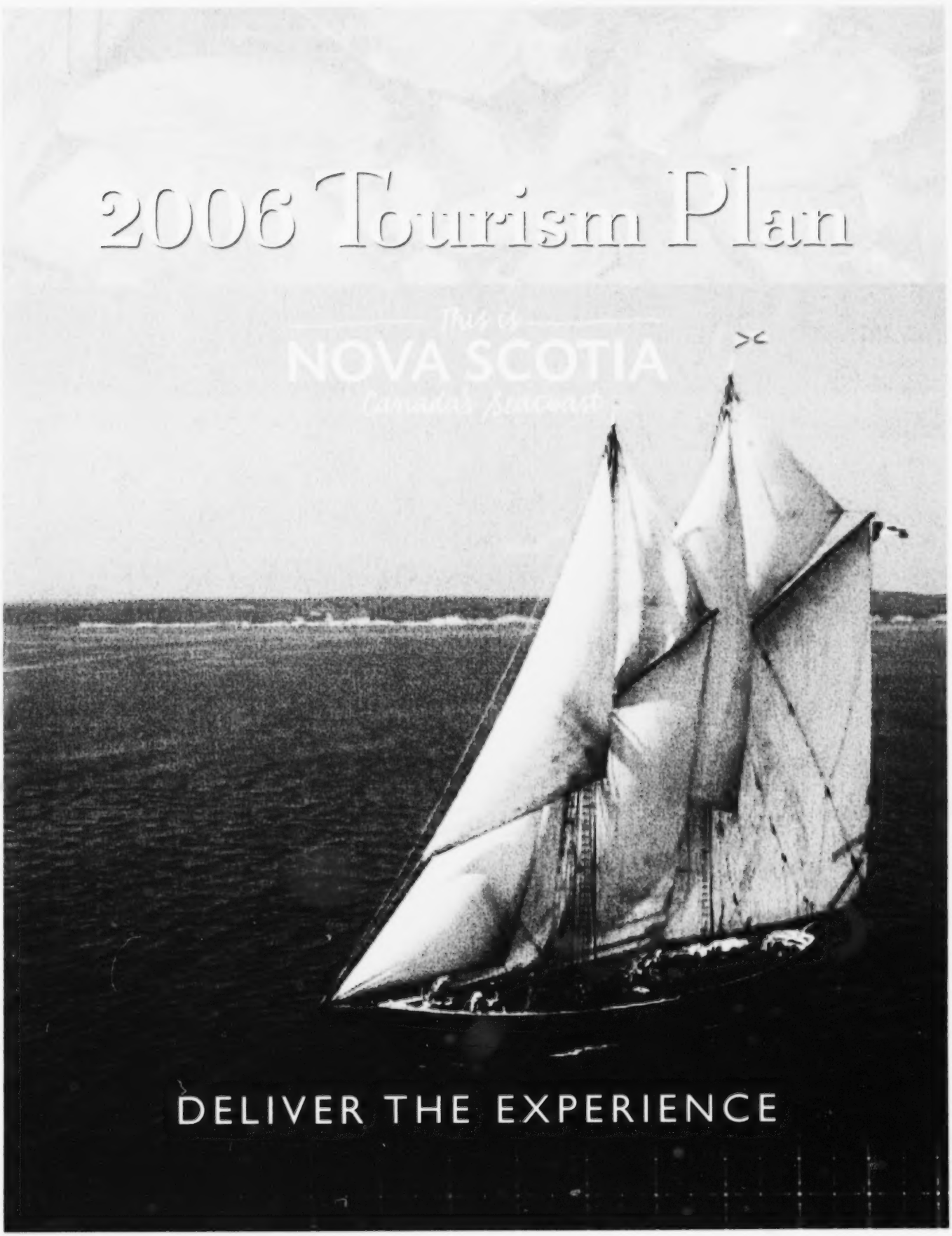
2006 Tourism Plan



DELIVER THE EXPERIENCE

'Nova Scotia grows with tourism.'

Dear Tourism Partners,

On behalf of the Government of Nova Scotia, I am proud to share with you Nova Scotia's 2006 Tourism Plan.

This plan was developed first and foremost by the tourism industry. I would like to thank the industry-led Tourism Partnership Council and its members for their work during the summer and fall months to get this plan ready. The Department of Tourism, Culture and Heritage values our relationship, working together with the TPC to build a stronger tourism industry, consistent with the vision of 100% revenue growth by 2012.

Nova Scotia's prosperity depends on a healthy, growing tourism industry. That's why we're one of the few provinces in Canada that collects and reports timely information on tourism industry performance throughout the year. This research allows industry and government to make adjustments to our plan when necessary in the face of sudden market changes beyond our control.

Despite the challenges experienced by many in the last year, we are making progress reaching new and returning visitors through our Tourism Plan, with our efforts earning national acclaim. There is greater awareness of the Nova Scotia experience. This plan will help convert greater awareness into increased visitation and revenue by tourists to Nova Scotia.

I am looking forward to a successful 2006 by putting this plan into action. As always, my door is open to any suggestions you may have.

Yours truly,

Rodney MacDonald
Minister of Tourism, Culture and Heritage

Dear Tourism Colleagues,

It gives me great pleasure to present the 2006 Tourism Plan.

This plan represents the input of countless tourism operators from one end of this province to the other. I deeply appreciate the many weeks and months of dedication my colleagues on the Nova Scotia Tourism Partnership Council have put into completing this plan. I would also be remiss in not expressing my gratitude to the Department of Tourism, Culture and Heritage for working side by side with the TPC to come up with this year's plan, as has been the case over the last several years.

More than 30,000 Nova Scotians depend on tourism for their livelihoods. Tourism touches almost every community in the province – rural and urban. Industry and government therefore have a responsibility to take the time to plan properly, based on research, the tourism marketplace and other factors affecting travel to Nova Scotia.

This plan is a product of that work. It's a product of what many tourism operators have told me and others in the industry. Let's keep the lines of communications open between industry and government to ensure the plan continues to work throughout the year.

Regards,

Charles Clerk
Chair
Nova Scotia Tourism Partnership Council

Delivering Our Vision to a Changing Traveller

NOVA SCOTIA
Tourism Partnership
COUNCIL

Nova Scotia's vision for tourism is crystal clear: to double our industry's revenues by 2012. This is surely an ambitious goal in today's uncertain global climate. Change is the only constant in our industry. Travel-planning behavior everywhere is changing and so too, are the needs of travellers.

We have factored this into our long-term strategy for reaching and motivating the increasingly choosy traveller. The ingredients for success are already in place. We are a billion dollar industry that welcomes over 2 million visitors annually, directly or indirectly, employs over 33,000 people and generates more than $200-million in tax revenue. Nova Scotia's potential in the worldwide tourism market remains undiminished.

Pursuing the Vision

It is going to take more than words on paper to fulfill our vision--particularly in a sector like ours, which is in the midst of a global shift. Doubling our industry's revenues by 2012 is going to require new ideas transformed into bold action. And we all have a role to play and an opportunity to grow and prosper.

No one can do it alone. **We are part of an industry that has always depended upon collaboration and cooperation for its success. The Tourism Partnership Council — which is responsible for this plan — is a prime example of that spirit.** Combining our resources gives us greater leverage to achieve things that we could only dream of by ourselves. Our 2006 Tourism Plan is about working together to bring the world to Nova Scotia. But it is only one component of a bigger strategy designed to help our industry reach its vast potential. We all believe in that future and promise. Together — with this plan as a guide — we believe we're closer than ever to making it happen.

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2005: Holding Our Own in a Challenging Year

By now it is no secret: 2005 was a demanding year for Nova Scotia's tourism industry. Seldom, in recent memory, have so many negative forces converged on the industry at once. We faced the loss of the Scotia Prince ferry service, a major transportation link to the New England market. The number of Americans travelling to Canada dropped to a 25-year low. Airfares in Canada rose 42% in the months following the loss of Jetsgo. Poor weather conditions in May and June, soaring fuel prices, travellers continuing concerns about security and economic uncertainty all caused turbulence. An ongoing shift in travel patterns also presented us with other challenges. This combination of global factors will continue to have an impact on travel patterns.

The 2005 tourism season brought its share of disappointments. As of the end of September 2005, overall non-resident overnight visitation to Nova Scotia lagged 5% behind last years' levels, while the accommodations sector experienced a 3% decline in room-nights sold. The decline was not evenly distributed across the province: the Northumberland Shore region, for instance, posted an increase of 6% in room nights sold, whereas the Annapolis Valley, which traditionally has benefited from US ferry traffic, experienced a significant decrease in room nights sold of 10%.

Of our core markets, visitation from New England suffered the most significant decline largely due to many of the challenges identified above. Visitation from New England was down 20% versus 2004. In other core markets we also saw declines in visitation: Atlantic Canada was down 5%, Ontario was off by 1% and Quebec was down by 13%. The projected net impact of the 2005 season is a 2% decrease in revenue.

One bright spot is that our efforts in the United Kingdom and Germany, which represent about 3% of our market, are showing positive results this year: as of September the number of international travellers visiting the province was up an impressive 23% from a year ago.

Nova Scotia was not the only province facing a tough year. While Nova Scotia is the only Atlantic Canadian province to consistently report official visitation statistics on a monthly basis, New Brunswick is unofficially reporting a relatively flat season with an overall decrease in US traffic and a sharp decrease in air from the US. Prince Edward Island is reporting a slight overall increase in visitation, following a year of double-digit decline in 2004. Nova Scotia commands the lion's share of visitation to the region.

On an encouraging note, our marketing efforts have successfully created interest in the Nova Scotia experience.

On an encouraging note, our marketing efforts successfully created interest in the Nova Scotia experience. In fact, response to our campaigns, in terms of inquiries for information was up 33% to the end of October and awareness is at an all-time high in most markets. There are other signs too that Nova Scotia continues to intrigue our markets – downloads from novascotia.com are up 12% in 2005, which means people are looking for more comprehensive information online about Nova Scotia than ever before.

Overall, Tourism is a long-term economic generator for Nova Scotia. Like every business operating in a competitive environment, we must adapt to trends and market forces. We know travellers are taking shorter trips more frequently and booking closer to departure. Increasingly, our customers are using the Internet to gather information. They want to be able to buy what we have to sell easily. Consumers are looking for safe, familiar destinations — not surprising given all the geo-political uncertainty around the globe. Because the marketplace is changing, our tactics must also continue to evolve.

Our 2006 Tourism Plan gives us the flexibility to respond to the challenges and opportunities that lie ahead. Our strategy has proven successful in the long run and we are confident we have a solid plan for 2006 and beyond.

2005 in Review

In spite of the difficulties that 2005 brought, there were also some significant successes that are important to recognize:

Building Blocks for Future Tourism Growth

A number of initiatives in 2005 will help pave the road for growth in 2006 and beyond.

- A significant new investment in tourism of $10,000,000 was made in 2005:
  - $6.3 million in marketing.
  - $500,000 for Regional Tourism Industry Associations.
  - $3.2 million in product development including investments in Peggy's Cove, Joggins Fossil Cliffs and the Millbrook First Nation that leveraged substantial partner dollars from other sources.
- Investments to enhance key tourism product priorities – cultural and heritage product, outdoor/nature and scenic touring product – laid the groundwork for future growth.
- Enhanced long-term marketing and travel-trade partnership with AAA Southern New England has been established and will support marketing efforts in the United States.
- Our Destination Development session was the most successful Product Development Day workshop to date – attended by over 150 industry participants.
- Our media relations program generated more than a 16 per cent increase in editorial coverage year to date – $38-million with a circulation of 116-million to the end of October.
- US Customs pre-clearance scheduled for 2006 will draw more flights to Nova Scotia and elevate Nova Scotia as an international gateway.

The Road Ahead

Many market factors point to a challenging year for the Tourism industry in 2006. The global health and security concerns following 9/11 will continue to impact tourism business everywhere. American travellers seem less inclined to visit Canada. Passport restrictions within the new Western Hemisphere Travel Initiative will potentially further inhibit travel from the United States (air and sea will be introduced in December 2006 and all modes in December 2007). Then, there remains the added uncertainty about the impact of rising gasoline prices on everything from travellers' disposable income to increased transportation costs.

While there are plenty of challenges, there are also opportunities. In the long run, we will achieve success by focusing on the elements within our control. Nova Scotia's unique combination of products and experiences will ensure Nova Scotia's competitiveness in an uncertain market. Our stunning seacoast, rich history, vibrant culture and remarkable collection of outdoors experiences will always remain our main strengths. In the current environment, our pristine natural environment and authentic maritime culture are what matters with tourists. To be successful Nova Scotia must offer a cost-competitive and accessible tourism experience.

We will explore new market opportunities. We will capitalize on opportunities in Western Canada. Finding additional ways to pull in travellers online presents huge possibilities. So too, does feeding the appetite for enriched vacation experiences like themed and packaged getaways, including air packages. In other words, giving today's choosy travellers precisely what they want.

Building on the Vision

Our main objective in developing the 2006 Tourism Plan is to support our goal of doubling Nova Scotia's tourism revenues by 2012. **To continue on the road to achieving that goal, our objective for 2006 is to increase tourism industry revenue by 2%.**

Delivering the Experience to Our Markets

How does a province the size of Nova Scotia compete against the rest of the world as a travel destination? One critical way is by targeting our finite marketing funds at the highest potential markets. Extensive research has shown us who our visitors are and where we need to focus our marketing dollars.

As a result, in the year ahead, our marketing efforts will focus on several key geographical areas: **Atlantic Canada**, **Northeastern United States**, **Quebec**, **Ontario** and **Europe**. Visitation from Western Canada continues to show potential for growth and in recognition of the market opportunity we will invest in the Alberta market in 2006.

Our sales strategy will also target specialized markets: **meetings and conventions**, **China**, the **cruise industry** and **group tours**.

Meet Your Market

Nova Scotia attracts visitors from around the world, however, the closer the geographic proximity the greater the opportunity. In 2004, our visitors came from the following markets:

- Atlantic Canada 55%
- Ontario 18%
- US 14% (including 5% coming from New England)
- Quebec 5%
- Western Canada 5%
- Overseas 3%

The more we know about our customers, the easier it is to speak to them. Our research has helped us figure out precisely whom we want to target in each geographical area. Here is a brief review of their demographic profiles:

Families and couples, 35+ (female skew), post-secondary, HHI $25K+, NB, PEI, NS, car

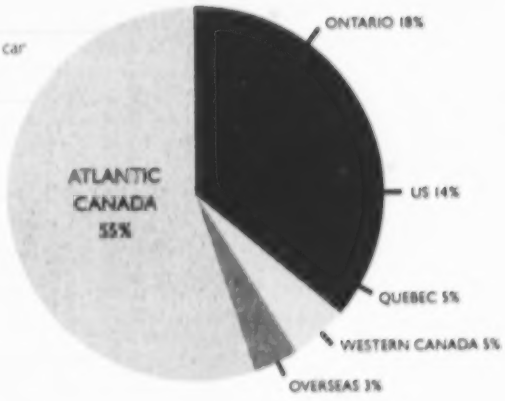
Families and couples, 45-64 (female skew), post-grad, HHI $60k+, Toronto, car/ferry, air

Couples, 45-64 (female skew), post-grad, HHI $60k+, Boston/Maine, car/ferry, air

French speaking couples, 45-64 (female skew), HHI $60k+, Montreal, car

Couples, 30-65, post-secondary, HHI $80k+, UK/Germany, air

Research can tell us where the potential travellers are. It can also single out the type of experiences and products that are most likely to bring them to Nova Scotia. Various studies, including Nova Scotia's Product-Market Match Study, identify the product clusters in which we have competitive strengths, or the potential to build competitive strengths. Our goal: to enhance the visitor experience for our target customer in the following areas: experiential touring (sight-seeing), outdoor/nature (hiking/walking, whale watching, birding, golf), culture/heritage (museums and historical sites, performing arts and music, festivals and events, cuisine and wine), urban experiences (dining, entertainment and shopping) and meetings and conventions (facilities and accommodations and pre and post programming).



Matching the Message to the Market

Matching the right product with the right market is critical. Here are the product categories we will be taking to each of our geographic markets:

Atlantic Canada

Quebec

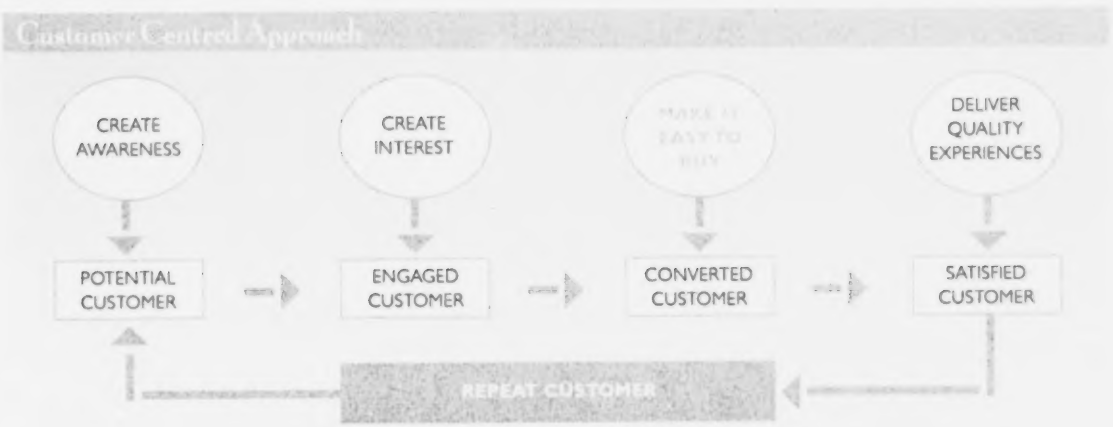
Ontario

United States

Europe

Western Canada

Strategy: Keeping Customer-Focused



The customer-centered approach brings us through the following thought process:

- Imagine a **potential customer** – someone who is considering a vacation but is not specifically thinking of Nova Scotia. Our job with this customer is to create awareness, to get into their decision set of possible destinations.
- When we have their attention, we have to create interest in our destination through marketing initiatives. As the customer becomes actively involved in the search for a vacation destination — scanning the web, perusing articles, reading ads, compiling information — they become an **engaged customer** and interest in Nova Scotia is established.
- Once they have made the 'right decision' to visit Nova Scotia, our job is to make it as easy as possible for our customer to experience and buy our products. This is accomplished through partnerships and a variety of retail offers, that leads to the person becoming a **converted customer**.
- If we've delivered quality experiences, that person continues to make purchasing decisions while they are here, and we've created a satisfied customer.
- Once we've done everything right, it greatly improves the chances of turning the **satisfied customer** into a repeat customer and an ambassador.

Strategic Priorities for Action in 2006

The customer-centered approach becomes the foundation for developing and implementing our 2006 strategic priorities:

Strategic Priority: Strengthen Transportation Access

Strengthening transportation access is a key recommendation from the Vision for Tourism. The sudden departure of the Scotia Prince in 2005 had a direct impact on visitation. It underscored the importance of transportation to our industry.

Whether it is by air, ferry, rail or road, any visitor who wants to come to Nova Scotia needs a pathway that's easy to find, easy to book and easy to access. Developing these links to ensure ease of access is our focus. Priorities for 2006 include:

Working with Our Partners

Nova Scotia has already formed strategic alliances with key stakeholders, including TIANS and the Halifax International Airport Authority to build new partnerships and programs that will result in more travellers bound for Nova Scotia.

Our partnership with Bay Ferries, CAT ferry service out of Maine is strong. Broadening ferry access between New England and Nova Scotia remains a priority.

Air links between Nova Scotia and points in North America and abroad are also vital to the growth of our industry. We know that air travel has rebounded globally since 9/11. Nova Scotia's air capacity, particularly from Europe, has kept pace and in fact has exceeded the previous peak level in 2001 (in 2005 air capacity from Europe increased by 29%).

Building an In-Market Sales Force

Improving travel access doesn't stop with the airlines. Building a sales culture starts in the marketplace, with well-trained tour operators and travel agents who are knowledgeable about Nova Scotia's transportation links, and understand how to sell our products and services. Nova Scotia will continue to aggressively work with the travel trade to assist air carriers, motorcoach and ferry companies to operate to their full capacity.

In 2006 We Will:

- Work with ferry partners to improve access from the US.
- Work with the Halifax International Airport Authority (HIAA) to build new routes from target markets.
- Increase awareness and sales in the United States and Europe by working with in-market sales representatives.
- Strengthen existing partnership efforts with VIA Rail, CanJet, Bay Ferries and Condor.
- Investigate partnerships with air carriers into Western Canada.

A new cross-departmental team has been established by the Minister's Task Force on Tourism to facilitate tourism input when prioritizing highway infrastructure improvements. The initial focus will be on the Cabot Trail and Peggy's Cove.

Strategic Priority: Evolve Destination Development

In order to differentiate Nova Scotia in the marketplace as a *'must go and experience destination'* there is a need to show our markets that there's new product on the shelf. Evolving our destination will focus efforts on three main streams:

- Tourism Destination Areas.
- Attraction Enhancement and Development.
- Product Experiences.

1. Tourism Destination Areas

Maximizing your efforts. One of the surest ways to increase visitor traffic to your community is by developing new products and experiences. Moreover, the better experience a traveller has the longer they are likely to stay — and more likely they are to return. That is why a primary focus in 2006 will be a variety of initiatives — taken in conjunction with community leaders, tourism officials and other stakeholders — meant to help communities develop their tourism destinations.

Top-notch tourism destinations offer visitors unique, high quality services and experiences in one central location. The Tourism Destination Area (TDA) process continues to be pivotal in attaining the Vision goal. The Tourism Partnership Council has dedicated time and resources to develop the TDA Resource Kit, which was made available to stakeholders in October 2004. It has clearly filled a void as communities from across Nova Scotia have requested the kit and started the process of assessing their community's tourism potential. One of the key accomplishments of the process to date has been the demonstrated willingness of community leaders to work together towards growing tourism in their destination.

Additional information modules have been completed. Now, it is a question of identifying our next steps and moving ahead with them. Together we will build on our tourism development capacity.

In 2006, communities can see what the TDA process has to offer them at the various stages of their journey. The development of a tiered model approach--which will outline the criteria and benefits for communities as they progress --is now in place. We want to hear from you and learn more about your destination development priorities. Share your development priorities so we can identify opportunities to support specific initiatives that will strengthen your tourism destination. This is an evolving process enabling communities to raise the bar through strategic tourism destination development and contribute towards achieving our overall tourism vision.

Coming together to grow our destinations.

Building on the success of the 2005 Destination Development workshop, in 2006 Roger Brooks will return to share more of his many practical examples of destinations following—and those not following— rules for successful tourism. We will work with Roger to bring communities, industry and partners together to learn more about ways to grow and strengthen our destinations. ***Mark your calendar for April 26*** and be part of this exciting workshop to help advance destination development.

Many communities in Nova Scotia have taken advantage of the Sustainable Tourism Communities initiative. This program gives communities an opportunity to assess their current tourism product offering and participate in planning exercises and workshops designed to help improve the quality of their destination. Designed to complement the TDA initiative, the Sustainable Tourism Communities workshops remain open to any community that wants to advance the planning process.

2. Attraction Enhancement and Development

Whether man-made, natural or heritage-related, our province's attractions offer visitors a look into our past, present and future.

In 2005, significant investments were made throughout the province for the development of new attractions such as Joggins Fossil Cliffs, Glooscap Interpretive Centre, Celtic Music Interpretive Centre, Ducks Unlimited Greenwing Legacy Interpretive Centre and Cape Breton Island Interpretive Centre at the Sydney Marine Centre. We will continue to work with these partners and others as they advance the planning and development of these attractions into quality, market-ready experiences.

Visit Peggy's Cove in 2006 and see first hand the enhanced visitors' experience. We will continue to build upon such investments made to strengthen our iconic destinations like Peggy's Cove and Cabot Trail that attract many visitors to the province, and continue to partner on opportunities to enhance our premier tourism sites.

In order to ensure we are offering the best experience to our visitors, in 2006 we will work with partners to develop an assessment program for new and existing attractions. Collectively, we want to ensure a memorable experience by making our sites come alive by providing a quality, interpretive experience.

3. New experiences. New opportunities.

Developing new product is vital if we are to remain competitive in the global marketplace. **New product means new experiences for our customers — and new sources of revenue for our industry**. That is why the focus in 2006 is to support the development and enhancement of product experiences that reflect our competitive strengths.

Outdoor and Nature Experiences

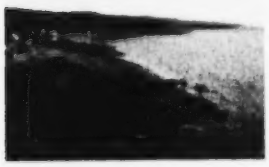
Outdoor and nature experiences are key product strengths for Nova Scotia. These experiences appeal to the experiential touring market as well as the outdoor segment. To build on our strengths we've launched development initiatives in specific product areas:

Birding

Birding is an emerging market with excellent potential to help address the seasonal nature of our tourist industry. Research (2004 Visitor Exit Survey - VES) shows 15% of visitors take part in a birding activity while visiting Nova Scotia. 'Birders' tend to spend more and stay longer than the average visitor, thereby having a greater economic impact. In 2006 look for new and enhanced birding infrastructure in Cape Sable Island, Digby Neck and Islands, and Sheffield Mills.

Tactics

- Continue working with community groups to develop the required infrastructure for major birding sites.
- Develop birding interpretive promotional material to identify accessible, market-ready important birding sites.
- Work with key stakeholders such as the Nova Scotia Bird Society to implement a provincial birding strategy and online birding resources.



Coastal Experiences

Every part of Nova Scotia's life and history is connected to the sea. A high percentage of visitors come to Nova Scotia to experience our diverse seacoast through various activities. Enhancing coastal experiences speaks directly to our Nova Scotia Brand.

Tactics

- Develop criteria to identify market-ready coastal experiences.
- Prepare a comprehensive inventory of accessible, market-ready coastal experiences and develop interpretive material.

Hiking / Walking

Hiking and walking is one of the major 'things to do' when visiting Nova Scotia. Over the past six years, Tourism has invested over $2.5 million in 56 projects for the development and enhancement of approximately 570 km of trails – many of them closely associated with the seacoast. These projects support the interests of our visitors as 70% of our visitors take part in leisurely walking and hiking activity in Nova Scotia (2004 VES). In 2006, visitors will experience new day-use trails at Cape Chignecto that offer some of the most spectacular views of 'The Three-Sisters' and the upper reaches of the Bay of Fundy.

Tactics

- Develop and implement a market-readiness assessment program in partnership with industry and community groups.
- In partnership with various stakeholders, enhance the market-readiness of our premiere coastal hiking/walking trails to ensure they meet visitors needs.

Snowmobiling

According to research studies, 'adventure experiences' are becoming a prime trip motivator. Developing snowmobiling trails and activities is an important step forward in our stated goal of extending the tourism season.

Tactics

- In partnership with stakeholders, assist in developing a more competitive snowmobile experience.

All of our Past is Present

For Nova Scotia to compete in today's tourism market place, we must provide 'product' that meets changing consumer demands and sets us apart from other competitors. Heritage and culture product is one way we can differentiate ourselves from the rest of the pack in many of our key markets. It is also consistently cited as an important draw for visitors. We will continue to assist partners in developing experiential heritage and cultural products to meet visitors' ever-changing expectations.

Living History and Enhanced Interpretation

Today's consumer is looking for an enriched, interactive experience. Historic sites and museums are working to further develop animated programming in order to 'tell their story' in an interactive manner. Recent investment projects will enable our visitors to learn more about our rich Gaelic culture through new interpretive programs at the Highland Village, experience the life of a Black Loyalist through participatory theatre in Birchtown, enroll in an Acadian rug-hooking package in Cheticamp or hear the elders' voices through a variety of programming at the Bear River Cultural/Heritage Centre.

Tactics

- Continue to implement new living history and animation initiatives at historic sites, museums or communities to enhance our hands-on heritage tourism experiences.
- Support the development of participatory, educational experiences related to our culture and heritage by proactively identifying new opportunities and partners for implementation.

Culinary Tourism

More and more visitors are hungry to try Nova Scotia's unique local food and sample a distinctive dining experience reflective of the local culture.

Cuisine and wine tourism in fact, is a growing product offering nation-wide. In 2005, implementation of the Cuisine and Wine Tourism Strategy began with the completion of a sector assessment study of culinary tourism and agri-tourism sectors.

Tactics

- Work with key stakeholders to develop an integrated, quality accreditation program for restaurants and product suppliers.
- Implement other key recommendations from the assessment study.

Economuseums

These unique museums showcase traditional trades and artisans at work. Economuseums speak directly to 'the experience' by allowing visitors to see first-hand how products are made. Currently under transformation are two Nova Scotia sites: Spruce Top Rug Hooking, Mahone Bay, and Artifacts in Clay, Chester. These sites will join the existing three Economuseums in Nova Scotia as we continue to build a stronger product cluster.

Tactics

- Advance the development of two additional Nova Scotia Economuseum sites.

There's More to Explore

Scenic touring is a key component of the visitors' experience in Nova Scotia. Through a variety of initiatives we will continue to improve the quality of this experience.

Look Offs and Scenic Views

Nova Scotia's terrain lends itself to a variety of look-off vantage points. The 'scenic drive' experience remains a major element of Nova Scotia's tourism product. Visitors will be able to travel along the Bay of Fundy in Kings County, enjoying the look-offs developed in Morden, Halls Harbour, Kingsport and Port Williams, with breath-taking viewscapes and enhanced interpretation. Work will also continue on improving scenic viewscapes primarily along the Cabot Trail.

Tactics

- Work with community groups to develop visitor amenities and interpretation at three strategically selected scenic look-offs.
- Work with our partners to encourage our major travelways and scenic drives have clear view planes through management and maintenance initiatives.

Experience Nova Scotia

Travel for many people means leaving behind the familiar and the ordinary — it means finding something new. Today's traveller wants to engage their senses, challenge their intellect and discover an opportunity for personal growth within an enjoyable setting. Our industry's challenge is maintaining the high quality of our current offerings while working together to create new visitor experiences.

Tactics

In 2006 we will continue to pursue this goal in many ways:

- Continue to develop an online inventory of travel experiences.
- Using thorough research, identify opportunities and determine requirements to develop new travel experiences.

Strategic Priority: Deliver SMART Tourism

The key to Nova Scotia's continued success and potential in realizing tourism growth is the quality and integrity of our natural environment, including our remarkable coastal assets. Our market-positioning in the global tourism market as an attractive seacoast and nature tourism destination is founded on maintaining the intrinsic scenic values and long-term sustainability of the natural resources that form the foundation of our tourism product.

The conservation of our natural environment is of paramount importance to tourism industry stakeholders, including the Nova Scotia Tourism Partnership Council, Department of Tourism, Culture and Heritage, and the private sector as a means to ensure the continued competitiveness and economic viability of tourism in the province. To better coordinate existing activities related to natural resources management and to endorse activities identified in the Sustainable Coastal Tourism Strategy, the SMART Strategy has been developed.

The SMART (**Sustainable-Marketable-Assets-Relevant to Tourism**) Strategy coordinates on-going tourism initiatives that further the sustainable management of our natural resources and support the provincial 'Green Plan' including but not limited to:

- Input into the Environmental Assessment process.
- Sustainable tourism community workshops and training.
- A tourism mapping and modeling project to identify tourism values and longer-term development opportunities.

Tactics

In 2006, the SMART Strategy will focus on the following activities:

- Establishment of a SMART working group to coordinate tourism/natural resources initiatives and lead those activities identified in the 2005 Coastal Tourism Strategy.
- Facilitation of a minimum of two community sustainable tourism training courses.
- Present coastal tourism priorities to international coastal managers in collaboration with the Atlantic Coastal Zone Information Steering Committee.
- Ongoing participation in interdepartmental committees related to natural resource management.

Strategic Priority: Making our Tourism Business More Competitive

It will take a concerted team effort to reach our goal of doubling tourism revenues. Now is the time to ask: How can we help improve your individual business or product offering? A wealth of programs, initiatives, resources and workshops are available to you simply for the asking. Step up – and stay involved.

Quality Market-Readiness

Market-readiness programs enhance the quality of tourism services, business and products and are available to all sectors of the industry that meet the program guidelines. Following are some of the areas that will be supported in 2006:

- Market-readiness assessments and mystery shops.
- Study tours and best practice missions that will assist Nova Scotia with educational development in strategic areas to expose operators to successful development and marketing models.
- Support for a broader knowledge for business development such as quality and innovative techniques in operations through professional development programs including interpretation, risk management and customer service.

Investing in People

The Quality Vision recommendation aims to ensure a well-trained, educated and stable workforce. We will continue to partner with the Tourism Human Resource Council (THRC) to support the delivery of human resource development by ensuring industry has access to cost effective professional development opportunities. In 2005, Nova Scotia successfully hosted the 5th National Tourism Human Resource Forum with the highest number of registered delegates to date. In addition, 'Service First – Making the Connection' was created and well received by industry as it supports the Vision of putting tourism first.

Training for both front-line and management levels of the Tourism Industry remain a key factor in delivering a positive visitor experience. In 2006 we will work with the THRC to support five core areas:

- Career Development.
- Industry Human Resource Professional Development.
- National Development.
- Human Resource Marketing and Implementation.
- Service Excellence.

Highlights for 2006 will include:

- New online learning programs.
- Programs to address labour shortages such as entry level cooks.
- Heritage interpreter training.
- Tourism Supervisor Certification.
- Delivery of the latest service excellence training program – 'Service First - Making the Connection'.

Business Development Tools

'How To' Guides

'How to' guides – The books are designed to provide detailed information necessary for establishing, operating and improving tourism related businesses. Eleven of the Guides have been updated and are now available for download online. Included is a new guide titled 'A Guide to Planning and Hosting a Community Festival or Event in Nova Scotia' Watch for 'A Guide to Marketing Your Nova Scotia Tourism Business' which will be updated and enhanced with two new subjects: Performance-Based Marketing and E-Marketing.

Workshops

The business climate is continuously changing, especially around new technology and consumer travel patterns. New techniques must be adopted to maintain and grow our market share. We will provide industry with professional development opportunities based on their needs and interest. Potential initiatives include:

- Performance-based Marketing.
- Destination Development.
- Travel Trade.
- E-Marketing.
- Packaging.

Strategic Priority: Take our Brand to New Places

The Nova Scotia Tourism brand – in essence what people think and feel when they hear our province's name – is a valuable asset. A brand after all, is a promise to visitors – a promise to deliver something they understand and value. This promise is conveyed in an idea that exists in the customer's mind, which is then captured in brand communications and finally, delivered through the experience of actually visiting Nova Scotia.

Nova Scotia's tourism brand positioning statement captures the 'unique point of difference' or promise we are making to our potential visitors. This statement articulates the unique benefits that Nova Scotia wants to be perceived as offering.

Tourism Brand Positioning Statement

Ensuring that the Nova Scotia Tourism brand continues to resonate positively with potential visitors is the focus of each and every one of our marketing and product development initiatives. Brand awareness and interest are created through advertising, but the moment of truth comes when the visitor experiences Nova Scotia. Every visitor experience provides an opportunity to create an ambassador for our province.

Our Priorities for 2006

- Test and investigate new markets.
- Continue to build our brand in key markets.
- Take advantage of events and initiatives that support our brand and appeal to specialized markets.
- Partnerships
- Leverage Canada: Keep Exploring and Brand Nova Scotia.

Test and Investigate New Markets

Nova Scotia must take advantage of new market opportunities that have potential to increase visitation and revenues.

Western Canada

Travellers from Alberta, Canada's fastest growing economy, consistently spend more per visit than the average Canadian. As well, new air links have made our province more accessible for Western travellers.

Tactics

- In 2006, Nova Scotia will test the potential of this market with a 'Nova Scotia Week' promotion consisting of advertising, public relations and travel trade partnerships targeted specifically at the Calgary market.

China

China is one of Canada's most important emerging markets.

Tactics

- With the support of Tourism Atlantic, Nova Scotia will investigate this emerging tourism market as part of a CTC-led exploration. Findings will be available broadly to the tourism industry.

Continue to Build Our Brand in Key Markets

We will continue to build brand awareness in our core markets of Atlantic Canada, Ontario and Quebec. We will create awareness through brand advertising, media relations, performance based marketing and by constantly honing our messages and media mix. There are two particular markets that deserve special mention for 2006:

Europe

2005 was a very good year for visitation from Europe. Air capacity from Europe increased by 29% and visitation soared by 23%. The parallel between access and visitation is clear.

Tactics

- In 2006, HIAA will contract sales support in all European markets for trade education and direct to consumer activities.
- Nova Scotia will market directly to consumers in specific European markets where access and a sales network exist, specifically the UK and Germany. Two examples include: a joint promotion in Germany with the CTC aimed at one million consumers, and attendance at consumer shows in Germany and the UK.
- Public Relations activities in Europe will be enhanced and focus on high yield media where Nova Scotia's unique product strengths such as scuba diving, whale watching and coastal hiking will be most relevant.

Northeast US

A major priority in the Northeast US is to strengthen transportation access and reinstate ourselves as an accessible and unique destination.

Tactics

- Building the relationship with the American Automobile Association (AAA) and its two million members in southern New England.
- High-profile events such as the Boston Tree Lighting event, and a new initiative surrounding a high-profile Tree Lighting in Bryant Park in Manhattan.
- In-market sales representation has been contracted through TIANS to expand our travel trade sales channels in New England.
- A detailed inventory of Northeastern US tour operators and wholesalers will be available to all Nova Scotia tourism operators.
- We will take advantage of promotional opportunities with one of our greatest internationally recognized tourism assets, Bluenose II, when she visits ports along the Eastern US seaboard.

Online Marketing and Public Relations

We will combine online marketing and Marketing Public Relations (MPR) with traditional advertising to develop brand awareness in key markets.

Our media relations program is an excellent way to increase visibility and promote Nova Scotia's attributes. Our media relations program provides the flexibility to tailor messages to specialized markets and to take key brand information to the wider target market. For a small investment we are able to generate coverage with third-party credibility in media that we could not afford to purchase.

Tactics

- In-market activities in 2006 will aim to highlight the range of transportation options from the northeastern United States e.g., air and ferry service.

Continue to combine traditional advertising media with a more aggressive online presence

Research has clearly demonstrated that the Internet has become a major source of information for travel planning and booking. This year, we will raise our online presence to a new level by incorporating new online marketing initiatives and partnerships with travel sites that include both editorial content and advertising.

Tactics

- We will use e-marketing to promote Nova Scotia to specialized markets such as music enthusiasts and motorcyclists, and will promote Nova Scotia as a four-season destination with seasonal sites and pages.
- In 2006, we will also investigate a new online editorial partnership with MSN/Sympatico featuring high profile placement of content on the MSN Travel page.
- Our official tourism website, novascotia.com will continue to be factored into all communications. At the same time we will continue to use traditional media tools in combination with our online efforts. We will sell Nova Scotia through print, television and radio ads. We will also promote the province through direct mail and promotional campaigns.
- An important recommendation of the Vision for Tourism involves performance-based marketing. We use a number of measures to gauge customer response to our media campaigns: website visits, business reply cards, awareness tracking, operator numbers, 1-800 calls, splash pages and coupon redemptions. Where we can measure directly with our customers, we also track sales when determining whether our approach is working.

Take advantage of events and initiatives that support our brand and appeal to specialized markets.

Events and Initiatives in 2006

We will take advantage of events and initiatives that deliver our brand and appeal to specialized markets. Nova Scotia's cultural icons/exports will be used as marketing tools in opportunity markets.

Tactics

- The Nova Scotia Tourism Partnership Council and the Nova Scotia Arts and Culture Partnership Council have formed a task team to work toward common initiatives that will benefit both sectors.
- The Milwaukee Irish Celtic Festival is the largest Irish cultural festival in the world. This festival attracts thousands of Celtic music lovers from all over North America. We will be there in support of Nova Scotia's cultural sector with a high-impact Nova Scotia promotion aimed at enticing Celtic music fans to Nova Scotia.
- One of Nova Scotia's newest cultural showcases, Drum!, is scheduled to present in several of our target markets in 2006 and we will connect with sponsorship opportunities this exciting show presents.
- Nova Scotia's sailing ambassador, Bluenose II, is planning port calls along the eastern seaboard in 2006. We will complement her efforts with a combination of trade and media activities.
- Major events like the 2006 Juno Awards and a major festival called Changing of the Guard will also provide opportunities to gain additional profile for Nova Scotia.

Partnerships

Partnerships — that allow the province to leverage its tourism efforts — have become an integral part of building the Nova Scotia brand. Partnerships are formed at many levels and range from product-related partnerships to transportation partnerships that help to strengthen accessibility. The province also participates in multi-lateral Agreements, including the Atlantic Canada Tourism Partnership, currently in negotiations for a new, multi-year term. Other key partners include the Atlantic Canada Opportunities Agency, Tourism Atlantic and the Canadian Tourism Commission. In 2006, partnership development with provincial destination marketing organizations will be a priority effort. We will also pursue partnerships with special interest sectors such as the motorcycle market where they add value to our brand.

Brand Kit

Our brand presence in the marketplace is strongest when different elements of our communications have a consistent look and feel. A marketing guidelines kit has been developed for key Nova Scotia stakeholders when producing marketing communications materials. The guidelines have been developed to ensure that the Nova Scotia Tourism brand identity is presented effectively and consistently across all communications. The brand kit will be available in CD format and online at nstpc.com for tourism suppliers and partners.

Leverage Canada: Keep Exploring and Brand Nova Scotia

We will find synergies with complementary brands to maximize our impact in the marketplace. Two key brand we will work with are the CTC's Canada: Keep Exploring and the Brand Nova Scotia initiative, led by the Office of Economic Development.

Canada: Keep Exploring

Nova Scotia is not the only destination honing its brand position. The Canadian Tourism Commission recently launched its new brand – Canada: Keep Exploring. The CTC's objective is to motivate visitation by re-establishing Canada as a must-see destination. Nova Scotia's Tourism brand and the Canada brand are fundamentally the same – a promise of an authentic, unique experience for our visitors. We will leverage the Canada brand whenever we work in partnership with the CTC.

Brand Nova Scotia

In advancing the Brand Nova Scotia initiative, we will work in partnership with Nova Scotia Business Inc. and the Office of Economic Development through a coordinated sales effort to maximize economic development and tourism sales efforts in target markets. Together, we will produce a joint Nova Scotia brand promotional piece to support marketing efforts.

Strategic Priority: Close the Sale

Effective brand marketing is maximized when we close that sale — get people to Nova Scotia, keep them here and attract them back once they leave. Growing the Nova Scotia tourism industry means providing travellers with the opportunity to easily make their purchase. It means providing a consistent sales culture no matter what channel a visitor uses.

E-Marketing

The Internet is transforming the travel industry. In fact, online travel bookings are the largest single category of spending anywhere on the net. **That is why E-Marketing plays such a central role in our strategy. And why we are taking a number of significant steps to deliver sales and service results by expanding our E-Marketing capabilities.**

In 2006, Nova Scotia will implement a new Tourism Customer Contact System (TCCS) which will consolidate our tourism operators, attractions, festivals and events and inquiry databases under one central database engine. This initiative will result in greatly expanded relationship marketing capabilities, and will allow us to match the right products with the right customers through all communications and sales channels including CheckIn, our provincial website novascotia.com and our Visitor Information Centres.

- Improving the amount and consistency of product information available to VIC and call centre staff.
- Introducing new, more customer friendly online booking capabilities.
- Consolidating multiple databases will ensure consistent and easily accessible information for VIC and call centre staff and consumers using novascotia.com.
- Investigating new opportunities for the online sale of new products such as enhanced packages and other services.
- Exploring new opportunities to manage online information whether festival and events listings, travel packages or accommodation rates and availability.
- Introducing a new mapping component will include proximity and routing information for consumers using novascotia.com as well as VIC and call centre staff.
- Using a new categorization system will allow packages to be linked to specific products.
- Microsites for specialized products such as music and seasonal promotions will be developed.

In 2006, tourism operators will be able to buy advertising space on novascotia.com and potentially reach millions of consumers who visit our site each year.

Visitor Information Servicing

We continue to take our lead from the 2003 Visitor Information Services Strategy, which made a number of sweeping recommendations that we continue to implement. The strategy includes market-driven recommendations designed to enhance the quality and level of information services, resulting in increased expenditures by our visitors. The Long-Term Planning Committee is currently reviewing and updating this strategy.

Visitor Information Centres and our CheckIn call center are important elements in making the sale and serving our customers.

We will deliver sales and service results through our Visitor Information Centres and call centres by:

- Focusing provincial Visitor Information Centre (VIC) and call centre staff training on selling and closing the sale.
- Making sales experience a preferred criteria for new provincial VIC staff.
- Ensuring that selling ability is a key part of provincial VIC staff performance evaluations.
- Ensuring that VIC staff and call centre staff receive Service First training. Service First is a customer-focused sales-based front-line training program offered by the Tourism Human Resource Council.
- Promoting national certification standards and SuperHost for front-line staff.
- Continuing to develop incentive programs for successful sales activities at VICs and call centres.
- Continually improving front-line staff's product knowledge through in-house training programs, including increasing staff's participation in local and provincial product knowledge tours.
- Increasing the variety of bookable products that VIC and call centre staff can sell.
- Making greater use of the Provincial VIC Mystery Shop program to evaluate provincial VIC's commitment to sales.

Travel Trade / Sales Programs

By developing mutually beneficial partnerships with the travel trade we are ensuring the entire industry grows and benefits. Sales actions include:

- Continuing to work with travel trade to build awareness of Nova Scotia and increase sales.
- Building awareness through trade shows and marketplaces, sales calls and training, promotional events and familiarization tours.
- Sharing our research on customer habits and likes and dislikes with the travel trade.
- Conducting research on price-point sensitivity and expectations when packaging Nova Scotia.
- Exploring closer partnership arrangements with airlines for air-only options.
- Partnering with airlines that offer full vacation packaging capability.

Our Planning Backbone

Research is our planning backbone. Sound strategies and effective decision-making are dependent upon access to accurate and timely research information. Nova Scotia is a nationally recognized leader in tourism industry activity measurement systems, some of which have been emulated by other jurisdictions.

As our Vision for Tourism indicates, staying informed about trends and industry performance levels is important to all stakeholders. A wealth of research information is available to the industry in Nova Scotia, in printed documents, online publications and via e-mail bulletins.

Research is being challenged to respond to increased information demands. The need for information is amplified in the face of growing competition, rapidly evolving consumer attitudes and changing market conditions. We are responding to those challenges. In 2006, our research efforts will be guided by the need to maintain and enhance tourism industry activity measurement systems to ensure they continue to be the foundation for tourism insights and decision-making.

We will continue to conduct the following kinds of research:

- **Economic impact research** demonstrates the importance of the tourism industry to ensure it gets the respect it deserves. This research will provide solid information to support sound business and investment decisions.
- **Industry measurement research** enables the Department to report to the industry, timely and relevant measures of tourism activity. This information guides planning for next year and beyond, as well as mid-season tactical adjustments.
- **Market intelligence** supports the development of competitive market strategies and tactics by providing consumer and marketplace insights. Simply put, this research tells us where the greatest potential lies and how we can convince consumers to visit Nova Scotia.
- **Product research** supports the development of competitive products, matching the right products to the right markets and identification of product development opportunities. By understanding the evolving needs of our visitor we can develop products that will keep Nova Scotia ahead of the competition.
- **Program evaluation** tells us how well our activities are working. Most importantly, this research identifies opportunities to make programs even more effective.
- **Creative development research** ensures that ad campaigns do their job. Decisions are made about imagery and messaging to best meet the objectives in specific markets.

Our research work in 2006 will:

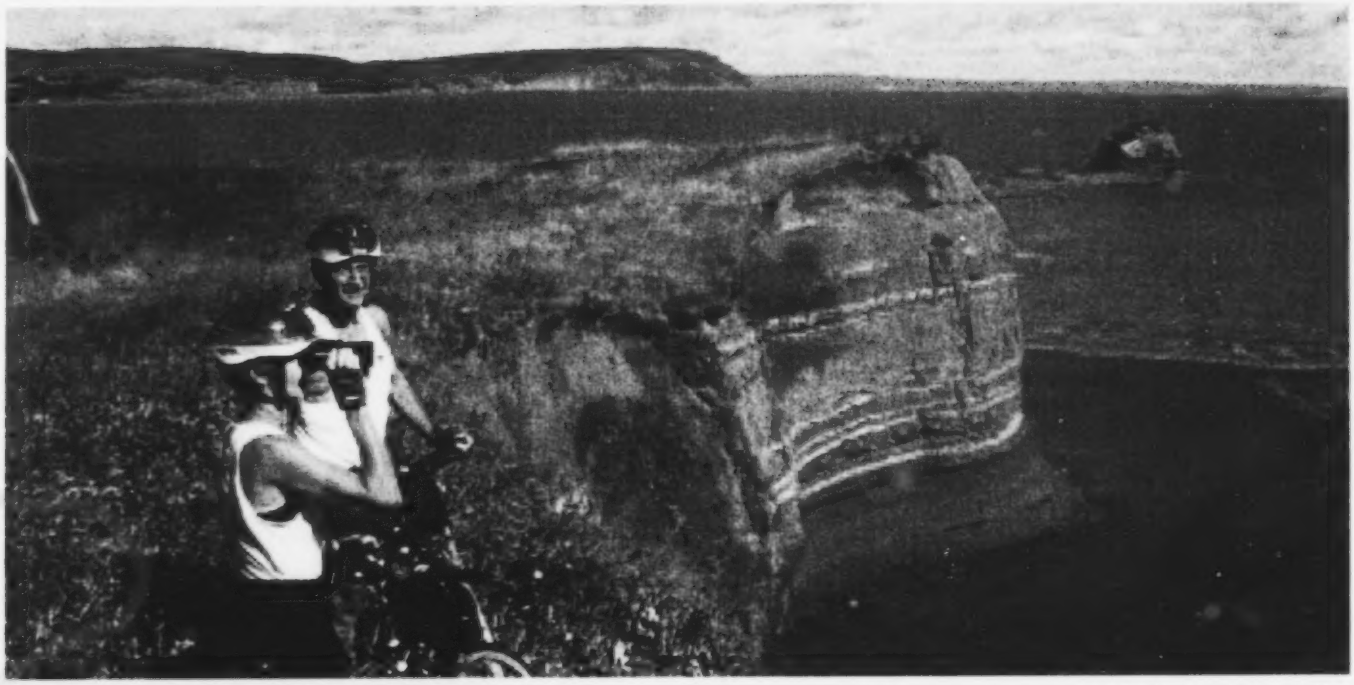
- Increase the strategic use of the Visitor Exit Survey (VES) by customizing information modules for specific markets, products and communities.
- Expand the use of provincial advertising evaluation research. For example, use this resource to identify ways to revitalize US and Ontario markets and to provide better insights on prospective visitors who decided not to travel to Nova Scotia.
- Use Statistics Canada's new Travel Survey for Residents of Canada to guide industry efforts to convince Nova Scotians to vacation at home.

In 2006 we will search for insights in the following areas:

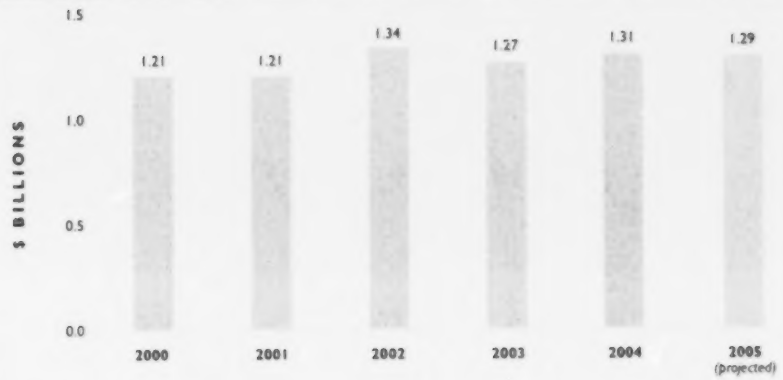
- Coordinate findings from a variety of sources to determine the underlying causes of the weakness in the US market. Insights from this initiative will be used to modify future marketing efforts to support rebuilding efforts.
- Identify new sources of business for the industry through research on emerging and growth market opportunities. This will include the Gay and Lesbian Travel Market, group travel niches and the promising Chinese market.
- Enable the industry to make more use of research. Enhance the web presence for Nova Scotia Tourism research products by, among things, expanding the online catalogue of research resources and making it easier to locate research resources through greater site coordination.
- Investigate the implications of the expanded time frame during which consumers are making their travel plans. While some travel plans and bookings are still made months in advance, our recent awareness research reveals that many decisions are made within weeks of departure. A better understanding of the decision-making process over this time frame will help to determine optimal times for marketing programs.

Leading the Way

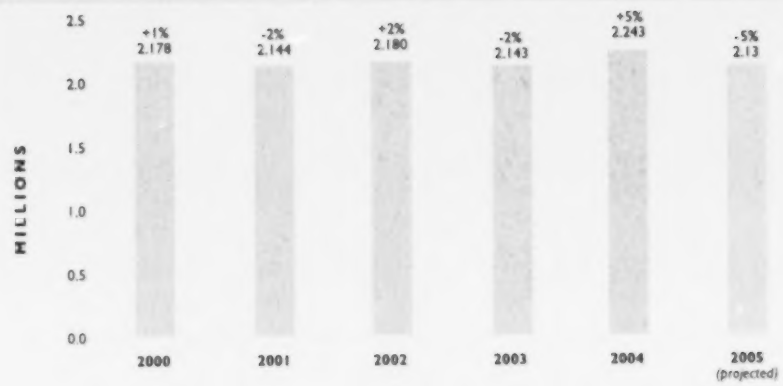
Nova Scotia is regarded as a national leader in monitoring tourism activity. Nova Scotia has been measuring tourism activity in the province since 1922. The province's ability to generate timely, credible and accurate tourism statistics is well regarded. All the same, the province is always reviewing its tourism monitoring systems and identifying enhancement opportunities to further cement the Department's leadership position.



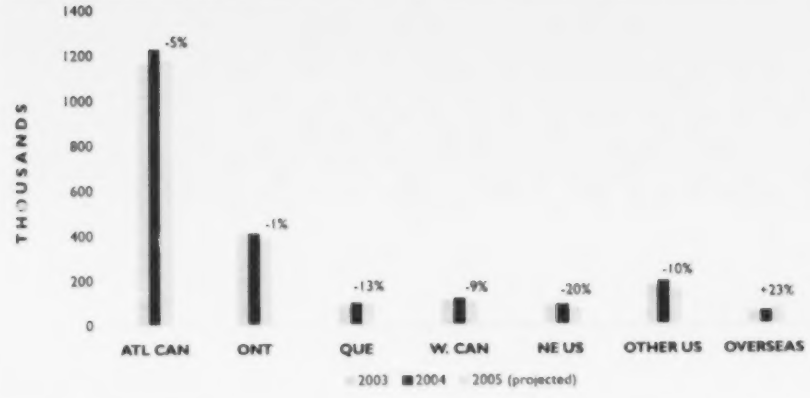
Appendix A: 2005 In Review



A series of external factors resulted in a challenging year in 2005. Preliminary estimates for 2005 show a 2% decrease in tourism revenues.

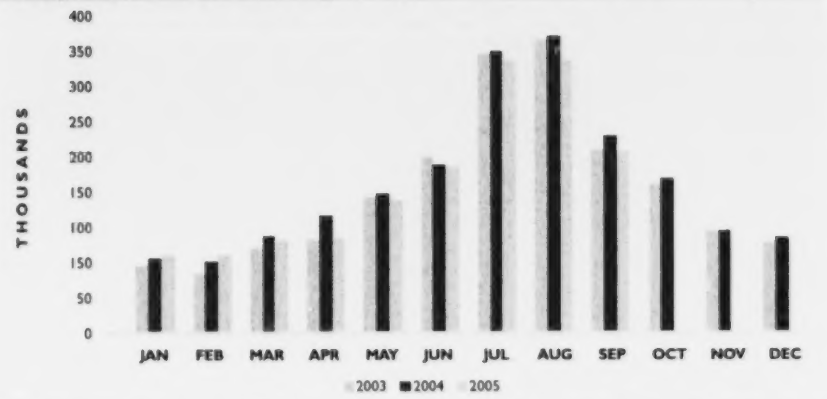


External challenges caused visitation to decline by 5% in 2005. However, thanks to events like the 400th Anniversary of Port Royal, the 50th Anniversary of the Canso Causeway and the highly successful LPGA event, the province will still have hosted over two million visitors in 2005.

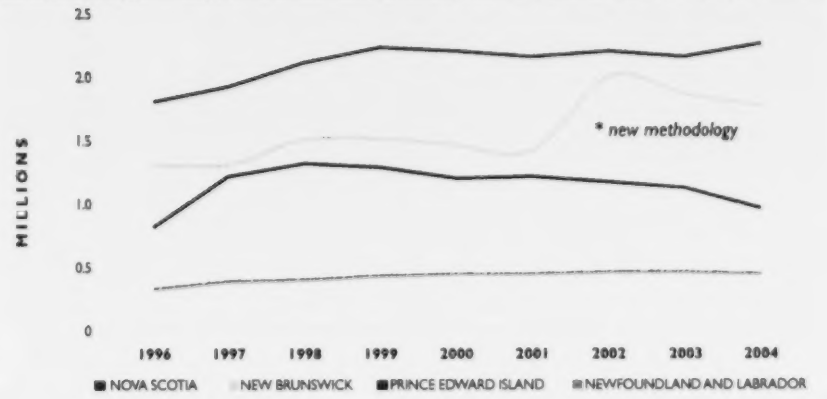


Atlantic Canada and, to a lesser degree, Ontario, remain our largest tourism markets. In 2005, an increase in traffic from overseas helped make up for the decline from the United States and Canada.

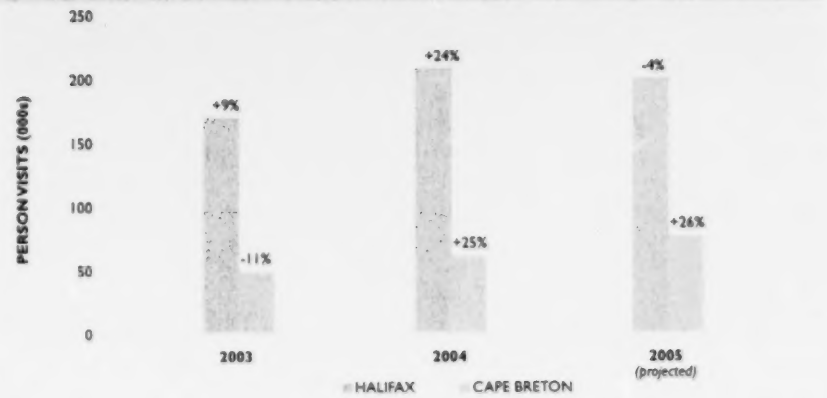
The peak June-September period continues to be the busiest for Nova Scotia's tourism industry.

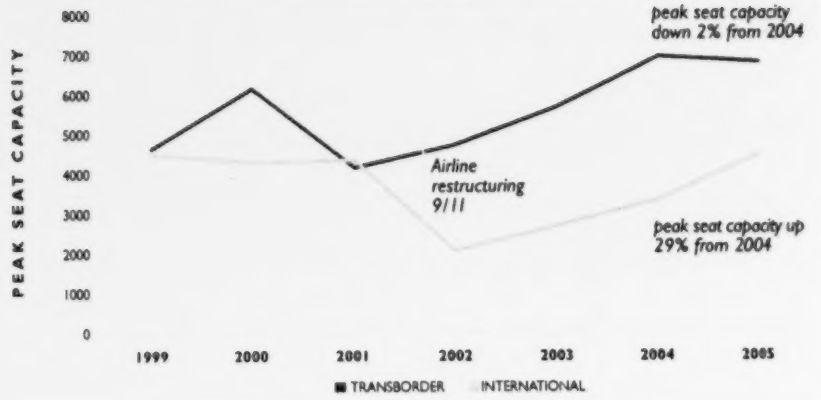


Nova Scotia leads the region in attracting tourists. During 2002, the gap narrowed, before resuming its former trend.

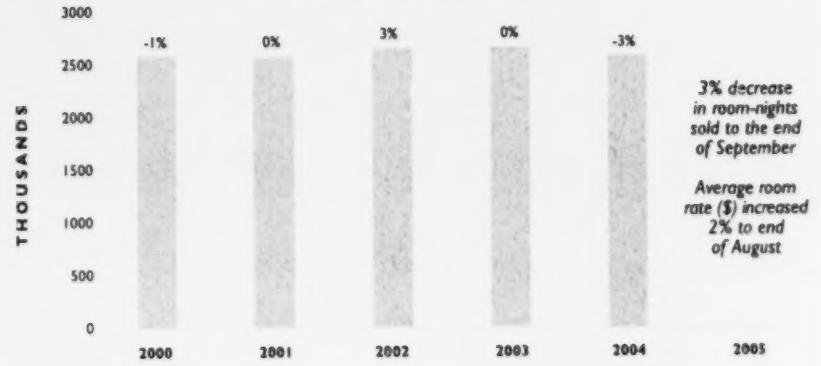


Cruise ship activity on the Halifax waterfront slipped 4% in 2005. But cruise ship visitors still pumped millions into the local economy. In 2005, the Port of Sydney hosted 26% more visitors than in 2004.

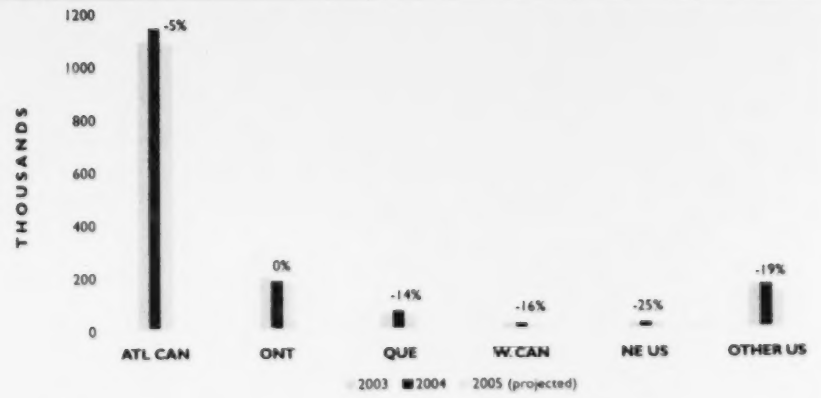




International seat capacity into Atlantic Canada continued to improve in 2005. Trans-border capacity leveled off this year.

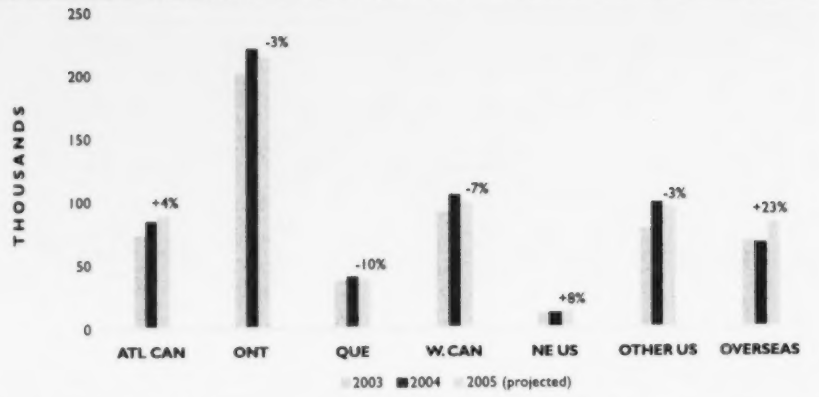


A combination of difficult global events has meant that the number of room-nights sold in Nova Scotia has been trending downwards since 2003. There was a 3% decrease in room-nights sold as of September.

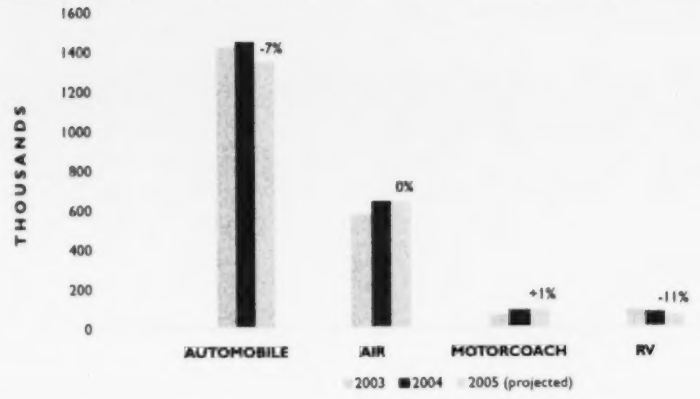


2005 was a tough year for visitation by road. With the exception of Ontario, all markets declined.

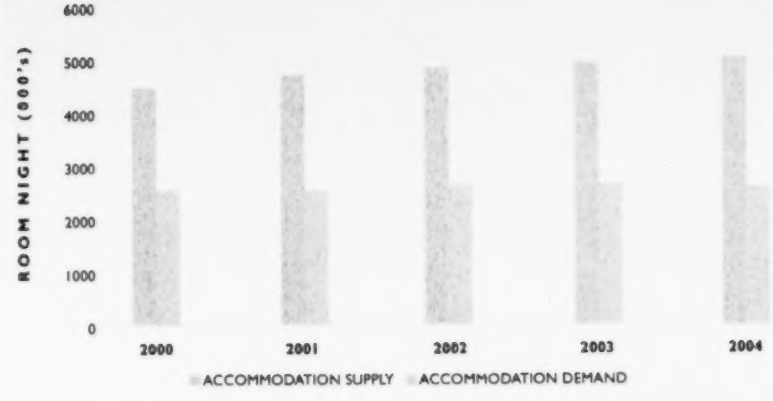
Air visitation results were mixed. Atlantic Canada, New England and Overseas all posted gains in 2005.



Despite a decline in overall visitation, motorcoach traffic grew by 1% and air held its own in 2005.



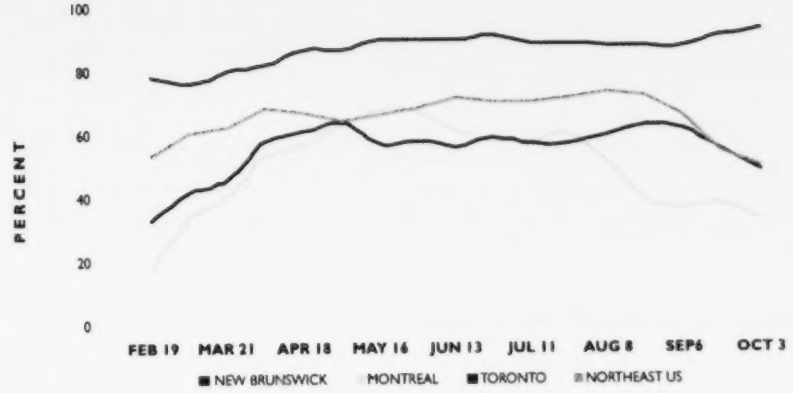
While room nights sold have been relatively steady over the past five years, room supply has edged upwards.



Appendix B: Advertising Results

	ATL. CAN.	QUEBEC	ONTARIO	USA	OTHER	TOTAL
Jan-Sept 2005	21,900	48,300	55,400	48,700	10,200	226,600
% Change	**+32**	**+48**	**+13**	**+64**	**+22**	**+33**

Our advertising campaign is clearly getting the word out about Nova Scotia. Despite the global tourism slump, ad-generated inquiries from our key markets (Atlantic Canada, Quebec, Ontario and the Northeastern United States) are up an impressive 33% from a year earlier.



Our ads made the biggest splash in New Brunswick and New England. Awareness generally peaks between April and September.

	ATL. CAN.	ONTARIO	QUEBEC	NEW ENGLAND	EUROPE
Conversion Rates by Market	58%	30%	23%	23%	N/A
Ad Generated Revenue	$11M	$37M	$20M	$14M	N/A
ROI Total Budget	12:1	12:1	12:1	7:1	8:1

** Europe ROI information is based on ACTP study (May 2005)*

Where do we get the best bang for our marketing dollars? The markets with the greatest ROI in 2004 were Ontario, Quebec and Atlantic Canada.

Appendix C: SWOT Analysis

Strengths

- Unique combination of competitive product strengths:
  - Seacoast scenery combined with rich history, culture and outdoor experiences.
  - Collection of world-renowned attractions (for example, Peggy's Cove and the Cabot Trail).
  - Easily accessible urban experiences.
- Brand equity/leadership in attracting Atlantic Canada Visitors.
- Pristine Natural environment.
- A safe destination.
- Authentic Maritime culture – friendly people/hospitality/service culture.
- Cost-competitive for most of our markets.
- Strong partnership environment and shared industry vision.
- Emerging Strengths:
  - Meetings, conventions and cruises.
  - Cuisine, wine, golf and birding destination.

Weaknesses

- Accessibility:
  - Limited transportation access for European travellers.
  - Loss of Portland Ferry makes access harder for New Englanders.
  - Distance by car from key markets.
  - Air cost is prohibitively high from some markets. (Average domestic airfares rose 42% in the first five months of 2005 reflecting the loss of Jetsgo and heavy price competition.)
  - Limited travel options from New England.
- Low top-of-mind destination awareness outside our region.
- Seasonality issues:
  - Limited off-season activities.
  - Limited capacity in prime season.
- Difficulty establishing and maintaining a Unique Selling Point in the U.S. market.
- HR Issues:
  - Limited French-language service capability.
  - Inconsistent delivery of high quality service.
- Infrastructure limitations:
  - Quality of facilities.
  - Roads and signage.
  - Access to funding for capital improvements.
  - Lack of accommodations in some areas.
- Product Development Limitations:
  - Perceived lack of "new product" to take to market.
  - Research gaps regarding new products.

Opportunities

- Increased propensity for air travel (ACTP study reflects that 51% of New England residents would fly to their destination).
- Increasing use of the Internet by consumers for travel planning.
- Travel trade relying more on online information for sales and customer planning.
- Increased capacity and visitation from Europe.
- Sales/Trade – Market appetite for enriched vacation experiences, packaged and themed tourism and spontaneous getaway packages (air package opportunities).
- Expanded decision-making time creates opportunities for more frequent contact throughout the planning cycle. (Some plan six months ahead but increasing numbers plan within two-three months.)
- Additional revenue potential per visitor.
- Demand for new products:
  - Birding
  - Experiential tourism
  - Cuisine and wine.
- Untapped business in the Meetings and Conventions sector.
- Youth market.
- Signature Events to leverage in 2006:
  - Juno Awards
  - Changing of the Guard at the Halifax Citadel.

Threats

- Global pressure on travel/tourism industry due to security, health and safety concerns.
- US travellers are less inclined to visit Canada:
  - The trend is evident in the overall decline to Canada in 2005 and the longer-term decline of Northeast US visitors to Nova Scotia.
  - US Western Hemisphere Travel initiative could add to the decline.
- Rapidly increasing gas prices that could have an impact in several ways:
  - Consumer travel intentions and behavior.
  - Economy and disposable income.
  - Transportation partners.
- Increasing limits on accessibility due to:
  - Rising air prices.
  - The loss of the Portland gateway (24 % of the New England auto market) which has created confusion in the market.
- Pressure on sustainability of our natural resources:
  - Declining coastal access.
  - Diminishing view planes.
- Competitive challenges:
  - Increased spending by competing destinations.
  - Finding ways to differentiate us from competing US markets.
  - Low airfares to competing destinations.
- The global health of the motorcoach sector.
- The high Canadian dollar makes the US more appealing to Canadians.
- Business threats:
  - Fluctuating exchange rates.
  - High insurance and liability costs.
  - Privacy policies (impact on direct marketing.)
  - Staff (qualified, seasonal, sustainable.)
  - Fuel costs

Appendix D: Vision Recommendations

THE VISION: Nova Scotia's Vision for Tourism aims to make dramatic advances in Nova Scotia's Tourism development by 2012. Our goal:
'100% Tourism Revenue Growth by 2012'

11 Key Recommendations

Product Development

1. Support and enhance the development of at least four Tourism Destination Areas that have existing infrastructure that can each generate 300,000-600,000 visitors annually over the next 10 years.

2. Drive the development of three new star generators that have the capacity of generating 600,000-750,000 visitors each per year to the province over the next 10 years.

Environment

3. Create and advance a sustainable tourism development strategy for Nova Scotia's 7,600 kilometers of coastline.

Administration of Tourism

4. Tourism stakeholders undertake a review to examine and implement an administrative structure that will support and enhance the Vision, '100% Tourism revenue growth by 2012'.

Marketing

5. The Tourism sector (private & governments) accelerates the use of performance-based marketing as a discipline and a tool to measure and generate improved results in all marketplaces.

6. Tourism stakeholders concentrate their efforts in enhancing and effectively communicating Nova Scotia's Brand -- to promote and sell Tourism based upon the connection and the lure of Nova Scotia and its seacoast.

Technology

7. Tourism stakeholders accelerate the current use of E-Marketing and Internet opportunities to take further advantage of the unprecedented growth of Internet usage by potential and current visitors.

Quality/Product Development

8. Execute standards of quality for Tourism facilities (food-roof accommodations and campgrounds), and to develop standards of quality and service for remaining Tourism sectors that will exceed visitor expectations.

Quality

9. Tourism stakeholders must develop and implement plans to ensure there is a well-trained, educated and stable Tourism workforce in the future.

Transportation

10. Tourism stakeholders develop a coordinated approach to the preservation, maintenance and development of the Tourism industry travel corridors including air, road, water and rail.

Research

11. Tourism stakeholders must reshape their research agenda and determine the necessary tactical information/data on our existing and potential customers/markets to grow Tourism revenues.

Matching the Message to the Market

All the research in the world adds up to nothing if we fail to match the right product with the right market. Here are the themes we will be using to sell our province to each geographic market:

Atlantic Canada

- A variety of products associated with the urban experience (including shopping).
- The outdoors (including our scenery and seacoast).
- Experiential touring.
- Our cuisine, history, culture and music.
- Golf.

United States

- Our culture, cuisine and music.
- Our stunning outdoors, including the seacoast.
- Our distinct history.
- Experiential Touring.
- Our proximity and dollar advantage.

Quebec

- The Acadian experience.
- Louisbourg and our other historical sites.
- Our outdoors, seacoast and fishing villages.
- Experiential touring.
- Our cuisine, culture and music.

Europe

- Stunning outdoor scenery, particularly along our seacoasts.
- A safe, accessible, inexpensive destination.
- Our unique culture, music and cuisine.
- Our distinctive history.

Ontario

- The warmth of our people.
- Nova Scotia's iconic historical sites.
- The outdoors, including our seacoast.
- Our culture, cuisine and music.
- Experiential touring.

Western Canada

- The outdoors, particularly our seacoast.
- The warmth of our people.
- Nova Scotia's iconic historical sites.
- Our culture, cuisine and music.
- Experiential touring.

Nova Scotia Department of Tourism, Culture and Heritage

World Trade and Convention Centre
PO Box 456
Halifax, NS B3J 2R5

Contact: Marsha Andrews
Executive Director – Tourism Division
[T] 902.424.5012
[F] 902.424.2668
www.novascotia.com

Nova Scotia Tourism Partnership Council

World Trade and Convention Centre
Suite 603, 1800 Argyle Street
Halifax, NS B3J 3N8

Contact: Charles Clerk
Chair, Tourism Partnership Council
[T] 902.424.0048
[F] 902.424.0723
www.nstpc.com